Cayuse SP – UC Davis
Handbook for Role Managers

Contents

Tips for Role Management

1. Use Mozilla Firefox for best results.
2. Login to https://ucdavis.cayuse424.com/ with Kerberos ID and Password.

Role Definitions - Following are the **only** Cayuse SP roles used at UC Davis.

Roles	Description
IPF Approver	**An individual designated with signing authority to review and approve proposals on behalf of his or her department.** Although all IPF Approvers for a given department receive an email notifying them when a proposal requires review, only one IPF Approver is required to approve the proposal to fulfill the departmental approval requirement. • Once an IPF Approver has reviewed the proposal and is satisfied with all aspects of it, he or she may electronically approve or reject the proposal. There is an opportunity as part of the approval process to mention any concerns or questions in a "note" attached to the proposal, which may be viewed by others reviewing the proposal. • IPF Approvers access proposals for review from the Department Approval Inbox in Cayuse SP. • If anyone other than the Department Chair/Center Director or Dean is established as an IPF Approver, the Department Chair/Center Director or Dean must return the signed Cayuse SP Role Delegation Authorization form to ORCayuseHelp@ucdavis.edu.
Role Manager	**An individual designated by the Dean or Department Head to add and remove roles for departmental personnel within Research Contacts.** • Department Chairs/Center Directors and/or Deans may request a Role Manager be added to their unit by emailing ORCayuseHelp@ucdavis.edu. • The Role Manager has the ability to add and remove roles at any time on his or her department's behalf. The Role Manager maintains his or her department's Research Contacts listing, including updating it as department personnel or job responsibilities change. • It is up to each department to make the determination as to how many Role Managers it should have; for backup purposes, we recommend at least two.
Pre-Award Spending Approver	**An individual designated with signing authority to review and approve Pre-Award Spending Requests.** Pre-Award Spending Requests for a proposal can be prepared and submitted electronically in Cayuse SP. Once submitted, all departmental Pre-Award Spending Approvers receive an email notifying them there is a Pre-Award Spending Request requiring review, which they can access through their Pre-Award Spending Inbox. Only one approver needs to approve the request in order to fulfill the departmental approval requirement. Pre-Award Spending Approvers should also be provided Proposal Data Access in order to view the Proposal Attachments tab. • If anyone other than the Department Chair/Center Director or Dean is established as a Pre-Award Spending Approver, the Department Chair/Center Director or Dean must return the signed Cayuse SP Role Delegation Authorization form to ORCayuseHelp@ucdavis.edu.
Research Account Manager	**An individual designated as the departmental contact person to receive research-related correspondence via email for dissemination to appropriate departmental personnel.**
Award Data Access	**View departmental award data contained in Cayuse SP through the Awards in My Department dashboard.**
Proposal Data Access	**View proposals in a given Admin Award Department, as well as access those proposals where that department is named, through the Proposals in My Department dashboard.** The user can perform the following tasks: view the proposal, its IPF and associated attachments; copy the proposal; and prepare a Pre-Award Spending Request for the proposal.

Option 1: From Research Contacts   **Option 2: From Cayuse SP**

View Unit Role Assignments

A one-minute video on viewing/identifying role assignments is available at https://youtu.be/6s3bTeVBw_4

Find the unit.
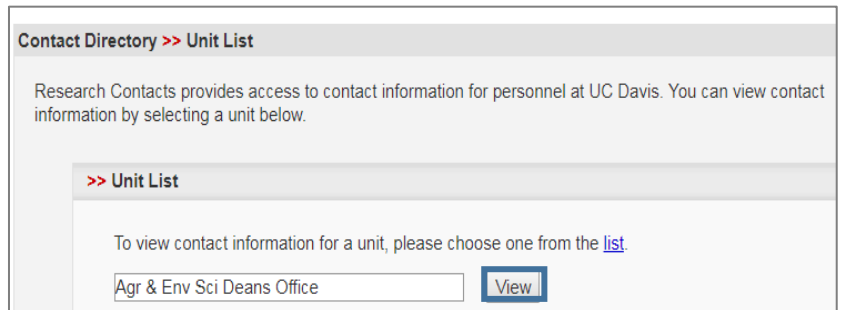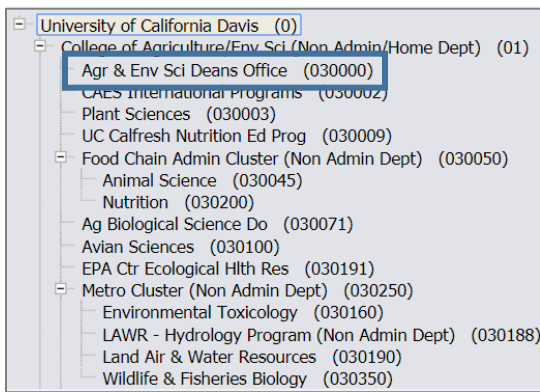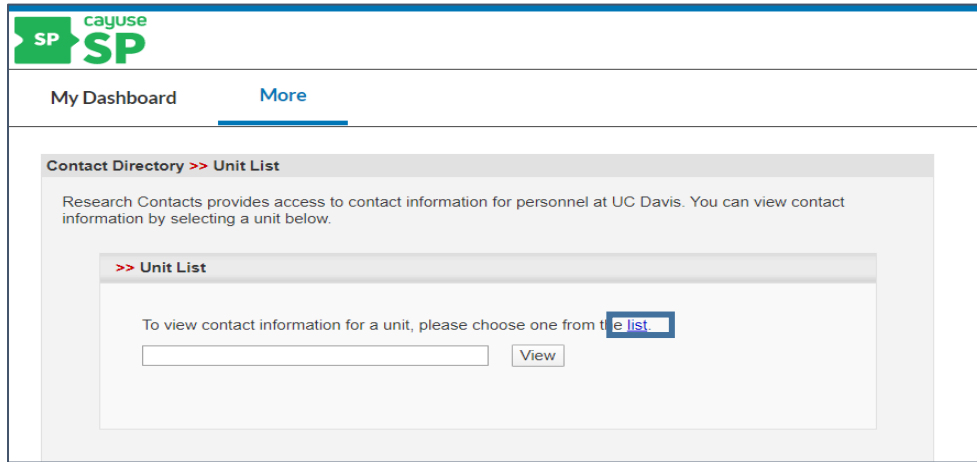
Users are listed on the left and the Roles on the right (Note: See Role Definitions for definitions)

Managing User Roles

A three-minute video on managing user roles (content of next 3 pages) is available at https://youtu.be/KcpSCQKuufw
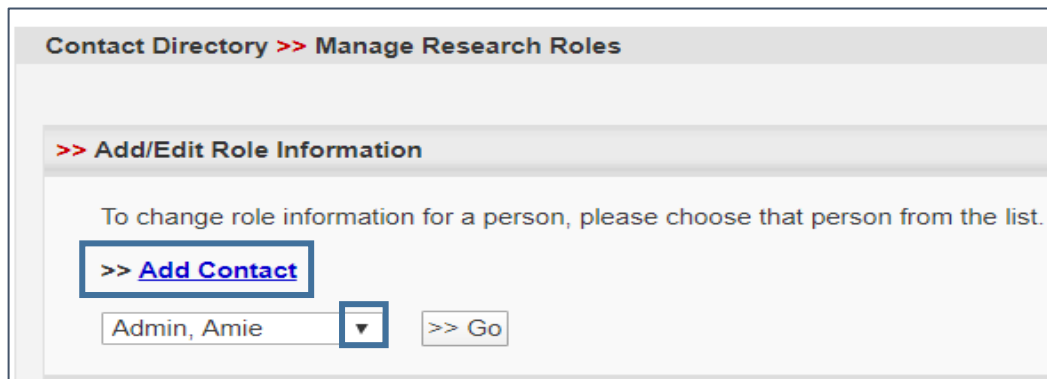
Adding a Research Contact

ROLE MANAGERS MUST FIRST ADD AN EXISTING USER AS A RESEARCH CONTACT TO ASSIGN DEPARTMENTAL ROLES.
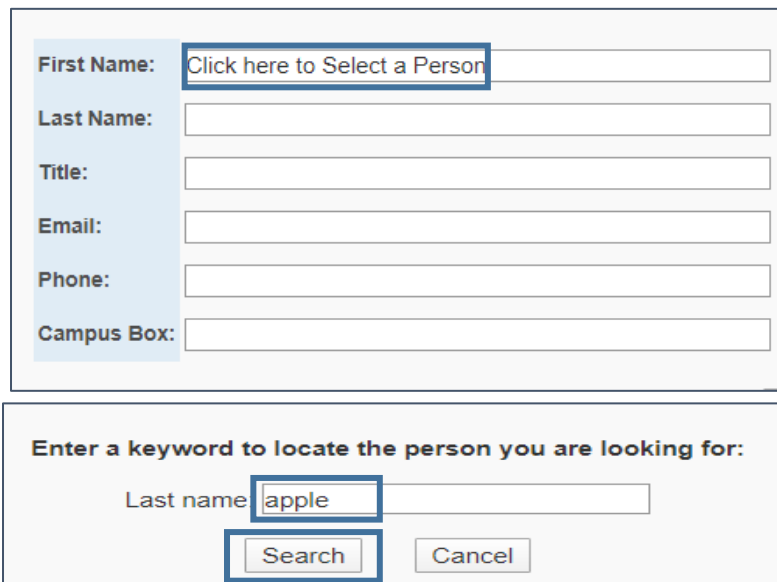
From either Cayuse SP or the Research Contacts page, select "More" then "Manage Roles".
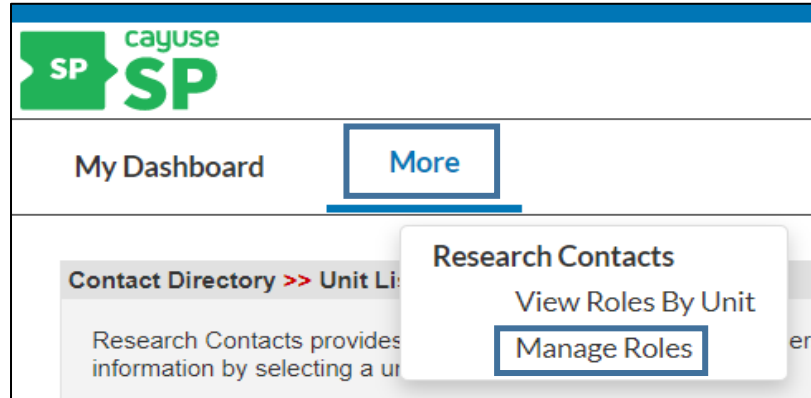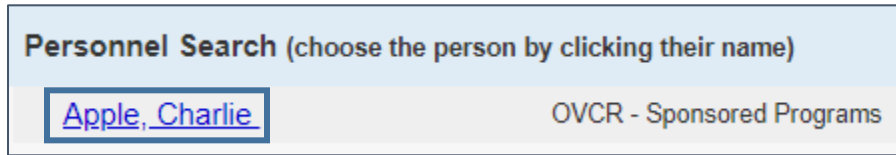
If the user is not on the list, select "Add Contact".

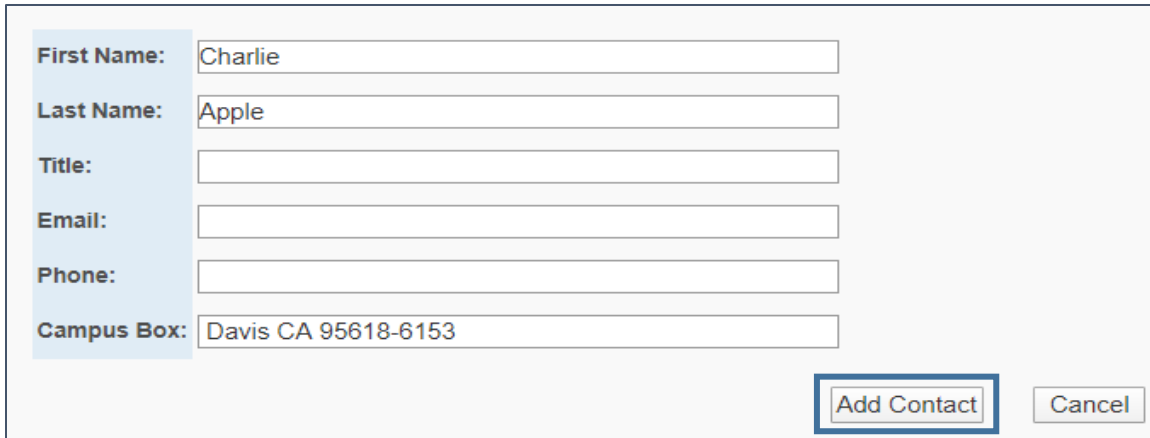Search for the person to add:

Select the person's name you want to add in the search results.

Personnel Search (choose the person by clicking their name)

Apple, Charlie   OVCR - Sponsored Programs

Select "Add Contact".

First Name:	Charlie
Last Name:	Apple
Title:	
Email:	
Phone:	
Campus Box:	Davis CA 95618-6153

[Add Contact]   [Cancel]
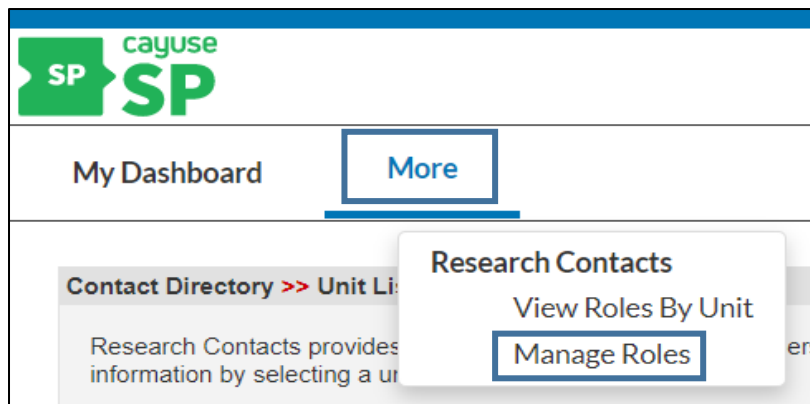
Adding and Deleting Roles

ONCE A USER IS ON THE RESEARCH CONTACTS LIST, THE ASSOCIATED ROLES MAY BE VIEWED AND EDITED.

From either Cayuse SP or the Research Contacts page, select "More" then "Manage Roles".

cayuse SP

My Dashboard   More

Research Contacts

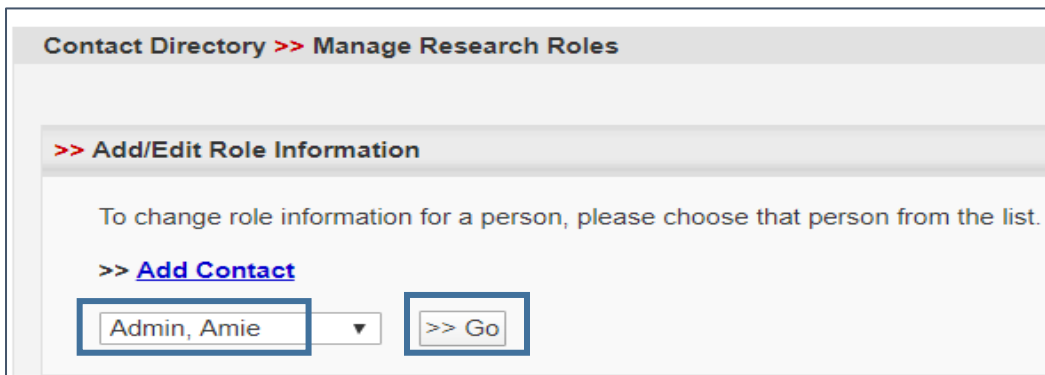Contact Directory >> Unit Li...   View Roles By Unit

Research Contacts provides...   ers
information by selecting a u...   Manage Roles

Select the relevant person's name and then select "Go".

Contact Directory >> Manage Research Roles

>> Add/Edit Role Information

To change role information for a person, please choose that person from the list.

>> Add Contact

Admin, Amie   ▼   >> Go

Add a Role

If you are a Role Manager for multiple units, select the relevant unit.

Select the Role to add.

Select "Add Role".

Delete a Role

Select "Remove Role" next to the relevant role.